

Issue: Contract Holder Verification

1. From the Dashboard, click on [Customer Search] at the bottom right corner.
2. Type in the contract holder's information in the appropriate fields.
 - a. First and last name.
 - b. Contract number.
 - c. Claim number.
 - d. Phone number.
 - e. VIN

Important! If the account was pulled up by anything other than the contract/claim number be sure to provide it. {e.g., "In regard to claim number _____, how can I help you?"}

3. Click **[Search]**
4. Once you click [Search], it will bring you to the next pop-up screen with the contract holder's information. When verifying the contract holder with anything besides the claim number you will verify:
 - a. First and last name
 - b. Email address
 - c. Phone number
 - d. Year, make, and model of the vehicle
 - ☐ To find the vehicle Information, use the **[horizontal scroll bar]** to view the information.
 - e. You may verify the mailing address as an alternate method if information is missing in the first four or if we need to send some correspondence to the contract holder.
 - f. If an email wasn't on file, ask the contract holder if they would like to add one. {Refer to SOP: How to Update Contract Holder Information}
5. When a contract holder provides a claim number to search; follow steps 1-2. Searching by the claim number will give you the contract holder's first and last name as well as the contract number.
6. Click on **[Claim Number]** and it will land you on the Claim level in CMS.
7. You will land on the Claim Details Tab
8. To verify the vehicle information, click on **[Vehicle]** on the right side of your screen.
9. To verify the contract holder's phone number and email address click on the contract holder's name under **[Account]**.
10. You will land on the personal information screen for the contract holder. Click on **[Details]** and it will show the phone number and email address.
 - a. a. If a listed contact calls in, they will also have to verify the contract holder's information.
 - b. b. If an immediate family member calls in who is not listed as a contact, we can proceed if they are able to verify the contract holder's information. Immediate family members are as follows:
 - ☐ Parent
 - ☐ Grandparents
 - ☐ Sibling

- ☐ Child
- ☐ Spouse

Once verified be sure to add them as a contact. We do not need the contract holder's consent for this. (Refer to SOP: Creating and Locating an Additional Contact.)

Important! Always confirm the person we are speaking with to be either the contract holder or other contact.

Contract Holder Verification for Outbound Calls

1. Refer to SOP: Greeting and Closing Calls
2. When verifying Contract holder, use the verbiage:

For security purposes can you please verify the year, make, and model of the vehicle.

- a. Refer to Steps 4 & 8 to locate vehicle information.

Related References and Documents:

SOP: Creating and Locating an Additional Contact

SOP: Greeting and Closing Calls

SOP: How to Update Contract Holder Information

Source: Contract Holder Verification

Purpose

This SOP is intended to outline how to verify a contract holder in CMS on the contract and claim level.

Teams Impacted

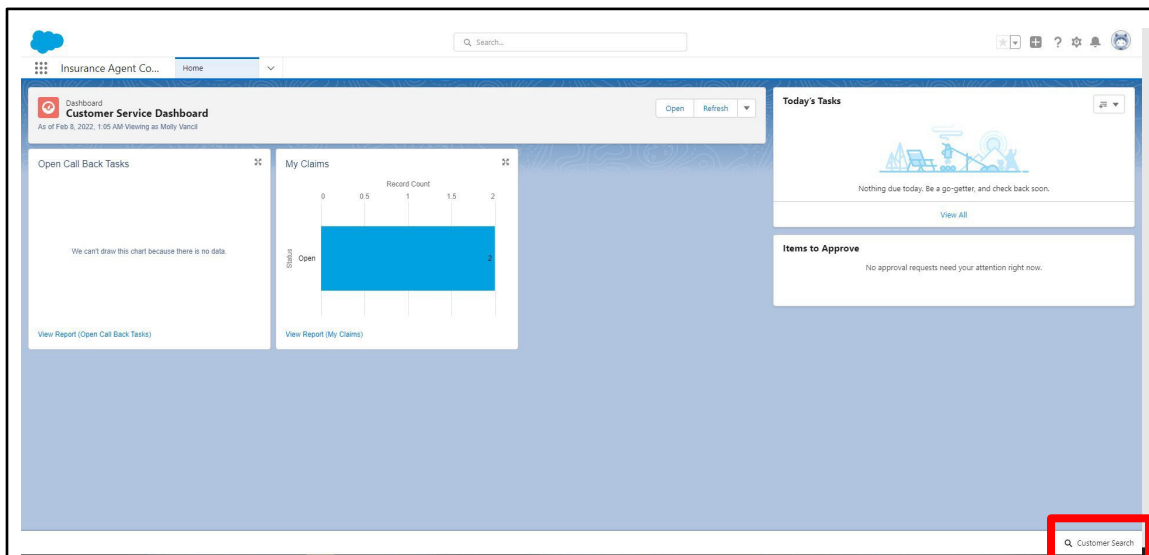
- Customer Service
- Claims

Related References and Documents

- SOP: Creating and Locating an Additional Contact
- SOP: Greeting and Closing Calls
- SOP: How to Update Contract Holder Information

Procedure

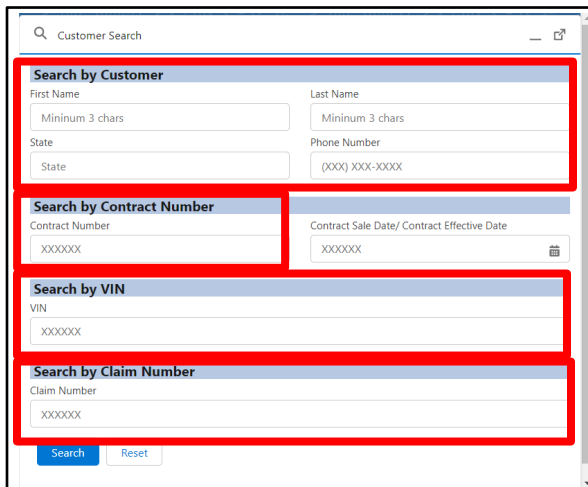
1. From the Dashboard, click on **[Customer Search]** at the bottom right corner.



2. Type in the contract holder's information in the appropriate fields.
 - a. First and last name.
 - b. Contract number.
 - c. Claim number.
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 - e. VIN

Important! If the account was pulled up by anything other than the contract/claim number be sure to provide it.

e.g., "In regard to claim number _____, how can I help you?"



Customer Search

Search by Customer

First Name
Minimum 3 chars

Last Name
Minimum 3 chars

State
State

Phone Number
(XXX) XXX-XXXX

Search by Contract Number

Contract Number
XXXXXX

Contract Sale Date/ Contract Effective Date
XXXXXX

Search by VIN

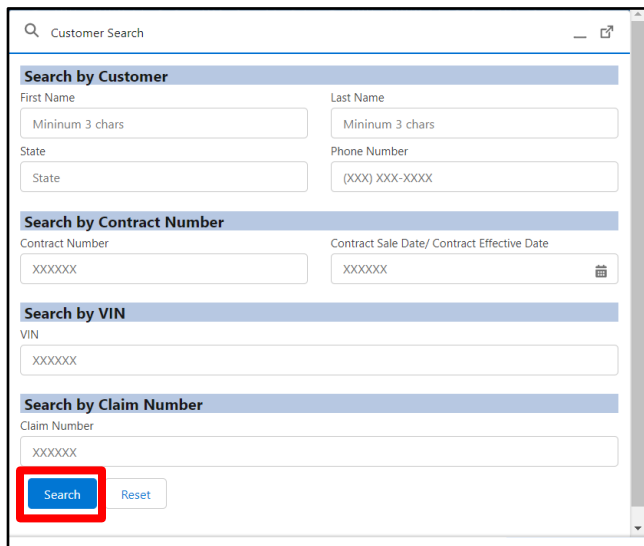
VIN
XXXXXX

Search by Claim Number

Claim Number
XXXXXX

Search Reset

3. Click **[Search]**.



Customer Search

Search by Customer

First Name
Minimum 3 chars

Last Name
Minimum 3 chars

State
State

Phone Number
(XXX) XXX-XXXX

Search by Contract Number

Contract Number
XXXXXX

Contract Sale Date/ Contract Effective Date
XXXXXX

Search by VIN

VIN
XXXXXX

Search by Claim Number

Claim Number
XXXXXX

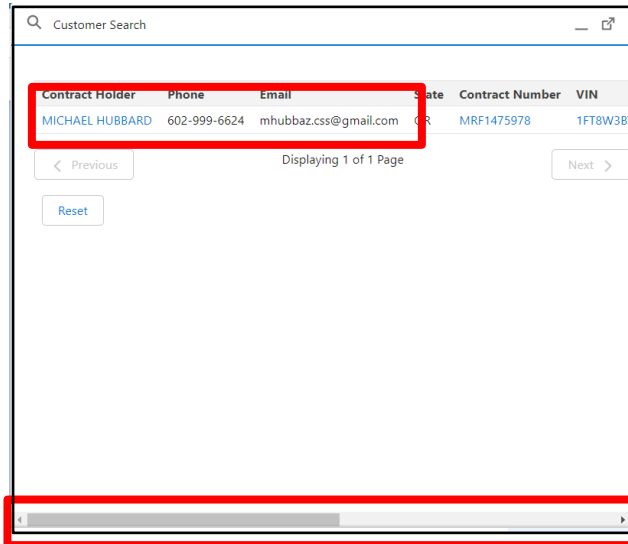
Search Reset

4. Once you click **[Search]**, it will bring you to the next pop-up screen with the contract holder's information. When verifying the contract holder with anything besides the claim number you will verify:

- First and last name,
- Email address
- Phone number
- Year, make, and model of the vehicle.

- To find the vehicle Information, use the **[horizontal scroll bar]** to view the information.

- e. You may verify the mailing address as an alternate method if information is missing in the first four or if we need to send some correspondence to the contract holder.
- f. Once verified, if an email wasn't on file ask the contract holder if they would like to add one. {Refer to SOP: **How to update contract holder information**}



Customer Search

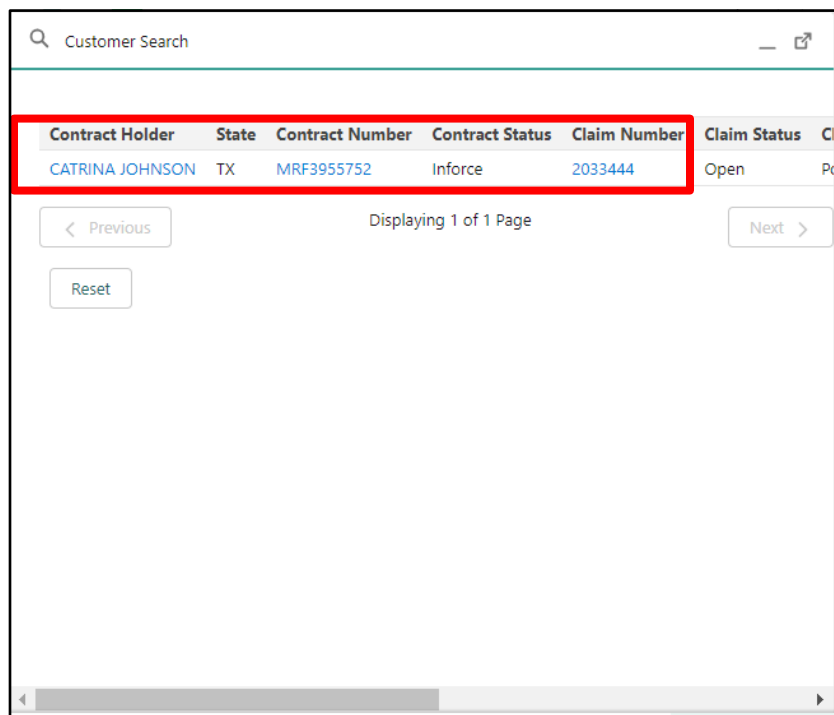
Contract Holder	Phone	Email	State	Contract Number	VIN
MICHAEL HUBBARD	602-999-6624	mhubbaz.css@gmail.com	OR	MRF1475978	1FT8W3B

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Reset

5. When a contract holder provides a claim number to search; follow steps 1-2. Searching by the claim number will give you the contract holder's first and last name as well as the contract number.



Customer Search

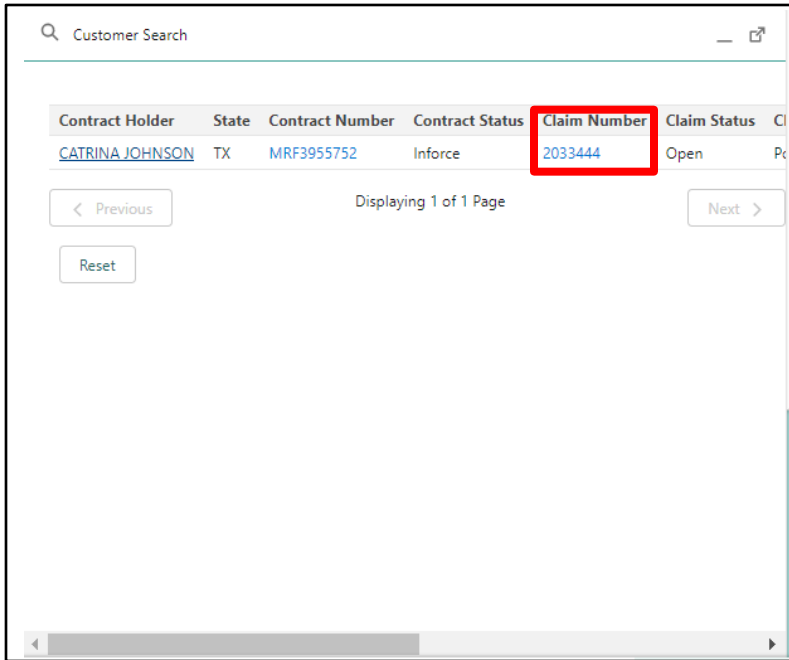
Contract Holder	State	Contract Number	Contract Status	Claim Number	Claim Status	Claim
CATRINA JOHNSON	TX	MRF3955752	Inforce	2033444	Open	Pc

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6. Click on **[Claim Number]** and it will land you on the Claim level in CMS.



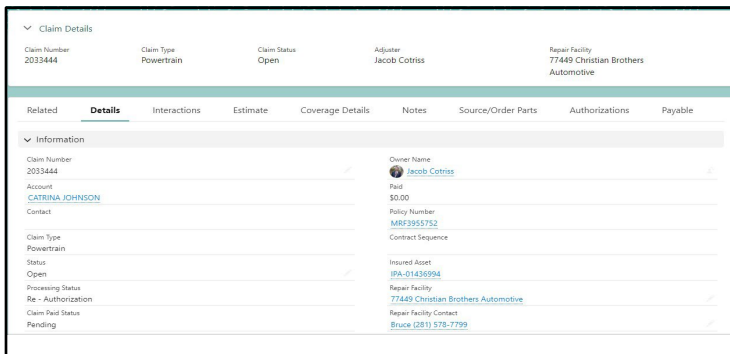
Customer Search

Contract Holder	State	Contract Number	Contract Status	Claim Number	Claim Status	Claim
CATRINA JOHNSON	TX	MRF3955752	Inforce	2033444	Open	Pe

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Reset

7. You will land on the Claim Details Tab



Claim Details

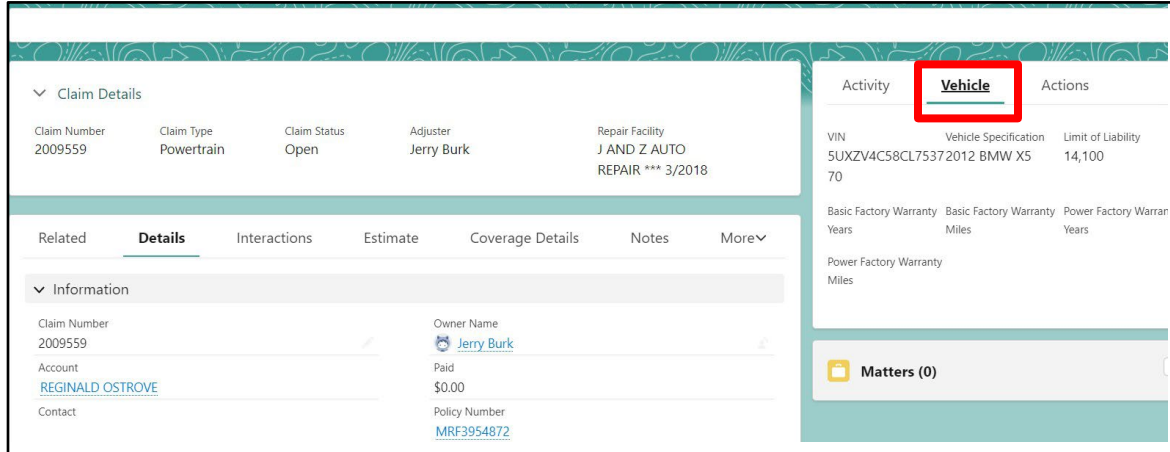
Claim Number: 2033444 Claim Type: Powertrain Claim Status: Open Adjuster: Jacob Cottriss Repair Facility: 77449 Christian Brothers Automotive

Related **Details** Interactions Estimate Coverage Details Notes Source/Order Parts Authorizations Payable

Information

Claim Number 2033444	Owner Name Jacob Cottriss
Account CATRINA JOHNSON	Field \$0.00
Contact	Policy Number MRF3955752
Claim Type Powertrain	Contract Sequence
Status Open	Insured Asset IPA-01436994
Processing Status	Repair Facility 77449 Christian Brothers Automotive
Re - Authorization	Repair Facility Contact Bruck (281) 578-7799
Claim Paid Status Pending	

8. To verify the vehicle information, click on **[Vehicle]** to the right side of your screen.



Claim Details

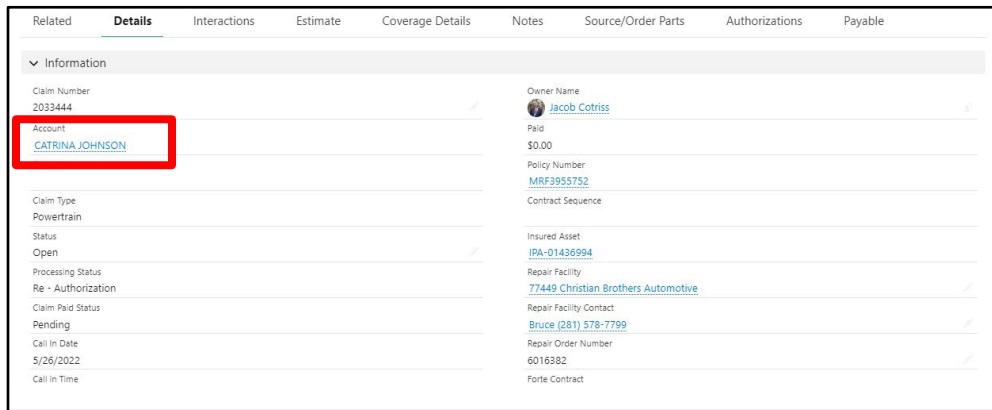
Claim Number 2009559	Claim Type Powertrain	Claim Status Open	Adjuster Jerry Burk	Repair Facility J AND Z AUTO REPAIR *** 3/2018
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Vehicle Information

Activity	Vehicle	Actions
VIN 5UXZV4C58CL75372012 BMW X5 70	Vehicle Specification 2012 BMW X5	Limit of Liability 14,100
Basic Factory Warranty Years	Basic Factory Warranty Miles	Power Factory Warrant Years
Power Factory Warranty Miles		

Matters (0)

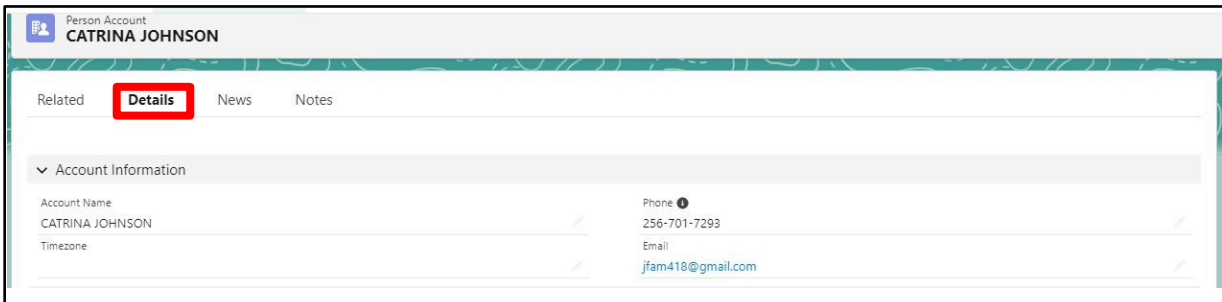
9. To verify the contract holder's phone number and email address click on the contract holder's name under **[Account]**.



Account Information

Claim Number 2033444	Owner Name Jacob Cottriss
Account CATRINA JOHNSON	Paid \$0.00
Claim Type Powertrain	Policy Number MRF3955752
Status Open	Contract Sequence
Processing Status Re - Authorization	Insured Asset IPA-01426994
Claim Paid Status Pending	Repair Facility 77449 Christian Brothers Automotive
Call In Date 5/26/2022	Repair Facility Contact Bruce (281) 578-7799
Call In Time	Repair Order Number 6016382
	Forté Contract

10. You will land on personal information screen for the contract holder. Click on **[Details]** and it will show the phone number and email address.



Person Account: CATRINA JOHNSON

Details

Account Information

Account Name CATRINA JOHNSON	Phone 256-701-7293
Timezone	Email jfam418@gmail.com

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Approval & Revision

Date Created 6/10/2022	Created By Felicia Mainiero		Date Approved 6/13/2022	Approved By Brian Coleman	
Date Revised 3/06/2023	Revised by Leonard Washington	Revision Description Procedures for non-listed and listed contacts		Date Approved 3/07/2023	Approved By Jason Hightower Vince Russomanno Alonso Aguilar
Date Revised 04/20/2023	Revised by Charles Dunn	Revision Description Updated SOP to New format.		Date Approved 4/20/2023	Approved By Leonard Washington
Date Revised 06/08/2023	Revised by Charles Dunn Leonard Washington	Revision Description Added a step 4.f, and important info under 10.a		Date Approved 6/12/2023	Approved By Jason Hightower Vincent Russomano Alonso Aguilar L&D: Chris Martin QA:
Date Revised 08/02/2023	Revised by Melissa Bryant	Revision Description Added Fast Track Article.		Date Approved 08/02/2023	Approved By Amanda Wiseman